NORTEL

CallPilot™

Release 4.0 - Standard 1.06

Desktop Messaging User Guide

for Microsoft Outlook

Updates to the Desktop Messaging User Guides

Business Communications Manager & CallPilot 100/150

Internet Clients

Page 9 Call the sender of a message

Call the sender of a message is not supported.
Contact Sender is not supported. This does not apply to the Instant Messaging feature. To support the Instant Messaging feature, the Contact Sender option must be available.

Page 9 Access web-based My CallPilot to view information and change your feature settings

My CallPilot is not supported. In its place, access to the web-based Mailbox Manager is supported. The My CallPilot field is replaced with the URL for Mailbox Manager.

The Internet mail clients supported are:

- Microsoft Outlook 2007
- Microsoft Outlook 2000
- Microsoft Outlook 2002 (XP)
- Microsoft Outlook 2003
- Window Mail (Vista)

Unified Messaging on BCM50 Release 3 supports the following Thin Clients:

- Citrix Metaframe Presentation 4.0 Windows 2003 Server (All editions)
- Citrix Metaframe XP on Windows 2000 Server (All editions) and Windows 2003 Server
- Citrix Metaframe Presentation Server 3.0 on Windows 2003 Server

CallPilot Desktop Messaging does not support Outlook and GroupWise on the same computer.

Page 10 What you need

BCM-supported browsers are IE5, IE6, and IE7.

Page 13 CallPilot Player

The Call the sender button is not available.
Contact Sender is not supported.

Page 38 Addressing messages

The Address Book functionality does not function in the same manner as in GroupWise.

Page 56 Linking to My CallPilot

Linking to My CallPilot is not supported. In its place, access to the web-based Mailbox Manager is supported. The My CallPilot field is replaced with the URL for Mailbox Manager.

Outlook, Lotus Notes, GroupWise

Page 9 Contact sender of a message

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Page 10 About this guide

The groupware e-mail clients that are supported are:

- Lotus Notes - 6.0, 6.5, 7.0
- Novell GroupWise - 6.5, 7.0, 7.0.1
- Microsoft Outlook - 2000, 2002 (XP), 2003, 2007

Unified Messaging on BCM50 Release 3 supports the following Thin Clients:

- Citrix Metaframe Presentation 4.0 Windows 2003 Server (All editions)
- Citrix Metaframe XP on Windows 2000 Server (All editions) and Windows 2003 Server
- Citrix Metaframe Presentation Server 3.0 on Windows 2003 Server

Page 13 (Page 12 Lotus Notes) CallPilot Player

The Call the sender button is not available.
Contact Sender is not supported. This does not apply to the Instant Messaging feature. To support the Instant Messaging feature, the Contact Sender option must be available.

Page 13 (Page 12 Lotus Notes) To play a message from your telephone

If your telephone is call forwarded to voicemail, cancel this feature before you access your messages from CallPilot Player.

Page 18 (Page15 Lotus Notes) Composing fax and text messages

On the Compose Fax dialog box you can use the Subject field to add additional information to the fax cover page (for example, the name of the recipient) when you send a fax directly to a fax machine. The maximum length you can enter in the Subject field is 80 characters.

Page 27 Using custom fax Cover Pages

Auto Cover Sheet is not supported.

Page 34 (Page 28 Lotus Notes) Calling the sender of a message

Calling the sender of a message is not supported.
Contact Sender is not supported. This does not apply to the Instant Messaging feature. To support the Instant Messaging feature, the Contact Sender option must be available.

Page 35 (Page 29 Lotus Notes) Setting message options

Delivery Receipt is not supported.

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Page 38 E-mail addresses versus Fax/Telephone numbers

The CallPilot Desktop client always attempts to find a CallPilot e-mail address or address information from Frequent Contacts and other Novell Personal Address books. If the e-mail address field is empty, CallPilot scans the recipient for phone and fax numbers. To send faxes, all other phone number fields must be empty.

Page 45 (Page 34 Lotus Notes and Microsoft Outlook) Personal distribution lists

Distribution Lists (BDL, SDL, PDL) are not supported.

Page 55 Changing audio settings

Admin Restriction of Audio Device is not supported.

Page 56 (Page 40 Lotus Notes and Page 39 Microsoft Outlook) Linking to My CallPilot

My CallPilot is not supported. In its place, access to the web-based Mailbox Manager is supported. The My CallPilot field is replaced with the URL for Mailbox Manager.

Page 56 Note:

CallPilot Player is actually in reference to the Audio Player. Go to **Start>Programs>Nortel>CallPilot>Audio Player**.

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CallPilot Desktop Messaging User Guide for Microsoft Outlook

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How to get Help

This section explains how to get help for Nortel products and services.

Getting Help from the Nortel Web site

The best way to get technical support for Nortel products is from the Nortel Technical Support Web site:

http://www.nortel.com/support

This site provides quick access to software, documentation, bulletins, and tools to address issues with Nortel products. More specifically, the site enables you to:

- download software, documentation, and product bulletins
- search the Technical Support Web site and the Nortel Knowledge Base for answers to technical issues
- sign up for automatic notification of new software and documentation for Nortel equipment
- open and manage technical support cases

Getting Help over the phone from a Nortel Solutions Center

If you don't find the information you require on the Nortel Technical Support Web site, and have a Nortel support contract, you can also get help over the phone from a Nortel Solutions Center.

In North America, call 1-800-4NORTEL (1-800-466-7835).

Outside North America, go to the following Web site to obtain the phone number for your region:

http://www.nortel.com/callus

Getting Help from a specialist by using an Express Routing Code

To access some Nortel Technical Solutions Centers, you can use an Express Routing Code (ERC) to quickly route your call to a specialist in your Nortel product or service. To locate the ERC for your product or service, go to:

http://www.nortel.com/erc

Getting Help through a Nortel distributor or reseller

If you purchased a service contract for your Nortel product from a distributor or authorized reseller, contact the technical support staff for that distributor or reseller.

CallPilot* from Nortel is an advanced business communications system that offers exceptional flexibility for managing your messaging needs.

You can work with CallPilot from your telephone or your computer. Desktop Messaging gives you access to your CallPilot mailbox through your Microsoft Outlook e-mail. Here are some of the many ways you can use CallPilot with your e-mail:

- Listen to voice messages.
- View and print fax messages.
- Record and send voice messages.
- Create and send fax messages, including batch faxes.
- Forward and reply to voice and fax messages.
- Contact the sender of a message.
- Add message options such as urgent and private.
- Add voice, fax, or text file attachments to messages.
- Start an Instant Messaging session from a message.
- Create personal distribution lists.
- Change your CallPilot password.
- Access web-based My CallPilot to view user information and change your feature settings.

Some features mentioned in this guide may not be available for your CallPilot mailbox. For details, refer to the *Feature availability* topic in the Desktop Messaging online Help, or ask your administrator.

Getting started

About this guide

This user guide describes how to use CallPilot with your Microsoft Outlook e-mail.

The instructions and screen images shown in this guide provide general information for using CallPilot with your e-mail. Specific details can vary depending on your computer operating system, the version of Outlook you are using, and the features available for your CallPilot mailbox.

For further assistance in using CallPilot, refer to the Desktop Messaging online Help.

What you need

Before you start to use CallPilot, your administrator ensures that your e-mail account is correctly configured for CallPilot. Your computer must be set up according to the following requirements:

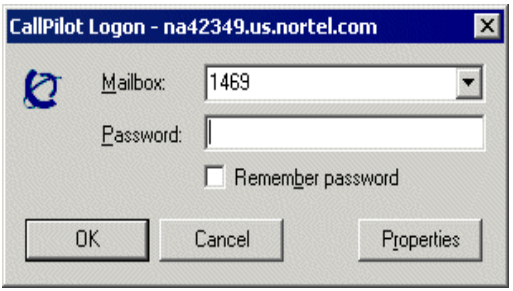
- CallPilot Player to play and record voice messages
- Nortel Fax Driver to create faxes
- Microsoft Outlook 2000, Microsoft Outlook 2002 (XP), or Microsoft Outlook 2003
- Windows 2000 Professional or Windows XP Professional
- Monitor with 256-color 800 x 600 capability
- 15 Mbytes of free disk space to install software
- Sound card and speakers for playing voice messages on your computer
- Microphone connected to your computer, or a telephone situated near your computer, for recording voice messages
- LAN (Ethernet), ISDN, ADSL, or dial-up modem connection to the CallPilot server for accessing CallPilot messages
- Internet Explorer 6.0; Netscape 6.2, 7.0, 7.1, 7.2; or Mozilla 1.7.x and Mozilla FireFox 1.0 on RedHat Linux 9 Operating System to access My CallPilot

Logging in

When you log in to your e-mail, you can log in to CallPilot at the same time.

To log in from Microsoft Outlook

1. Open your Microsoft Outlook e-mail. The **CallPilot Logon** dialog box appears.
2. In **Mailbox**, type or select your mailbox number.
3. In **Password**, type your CallPilot password.
4. Check **Remember password** if you want CallPilot to log in automatically.
5. Click **OK**.



Note: Do not leave the Remember password box checked on a shared computer.

To log out

When you exit Microsoft Outlook, you automatically log out from CallPilot.

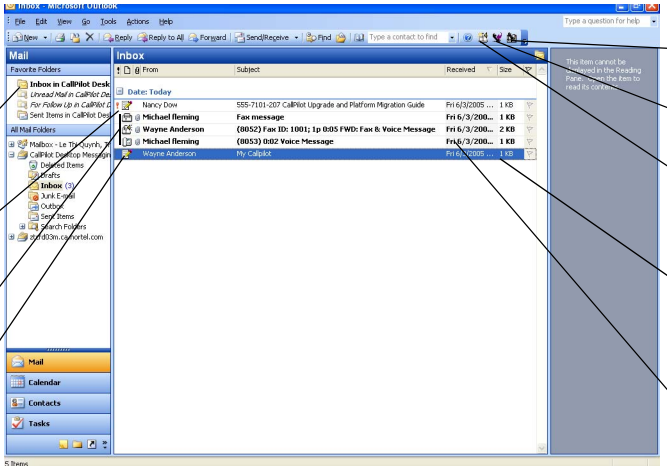
Remote login

You can log in to your mailbox from any computer that has CallPilot installed and configured in the same way as your office computer. For example, you can use a computer set up for guest access, or your home computer with a dial-up connection to the server.

Working with your CallPilot messages

When you open your e-mail with CallPilot installed, your CallPilot messages appear in the CallPilot Message Store. The Message Store contains folders for your CallPilot Inbox, Outbox, Sent Items, and Deleted Items.

Your CallPilot Inbox



To check for new messages

The CallPilot message waiting indicator in the notification area of your taskbar turns red when you have a new message. To turn the indicator on or off, see *Changing mail delivery settings*, page 51. New messages appear in bold.

To open a message

To open a CallPilot message, double-click anywhere on the message line. See *Playing voice messages*, page 13, and *Viewing fax messages*, page 15.

To delete a message

To delete a CallPilot message in your Inbox, click on the message to select it, then click the Delete icon on the toolbar. You can also click the Delete icon in an open CallPilot message. The deleted message moves to the Deleted Items folder. When you log out, or click Exit from Outlook, your CallPilot messages in the Deleted Items folder are immediately deleted without confirmation.

To organize your messages

To organize your messages, you can create new CallPilot folders in the CallPilot Message Store, and move your messages to these folders. You can access these message when you log in by telephone or through My CallPilot.

Playing voice messages

When you open a voice-only message, the CallPilot Player appears. In mixed voice, fax, or text messages, click the Voice icon to open the CallPilot Player.

To select your telephone or computer to play voice messages

You can choose to play your voice messages from your telephone or your computer. To change from one to the other, or to change the telephone number that CallPilot dials, see *Changing audio settings*, page 55. You can also click the Telephone or Computer icon on the CallPilot Player to change the setting.

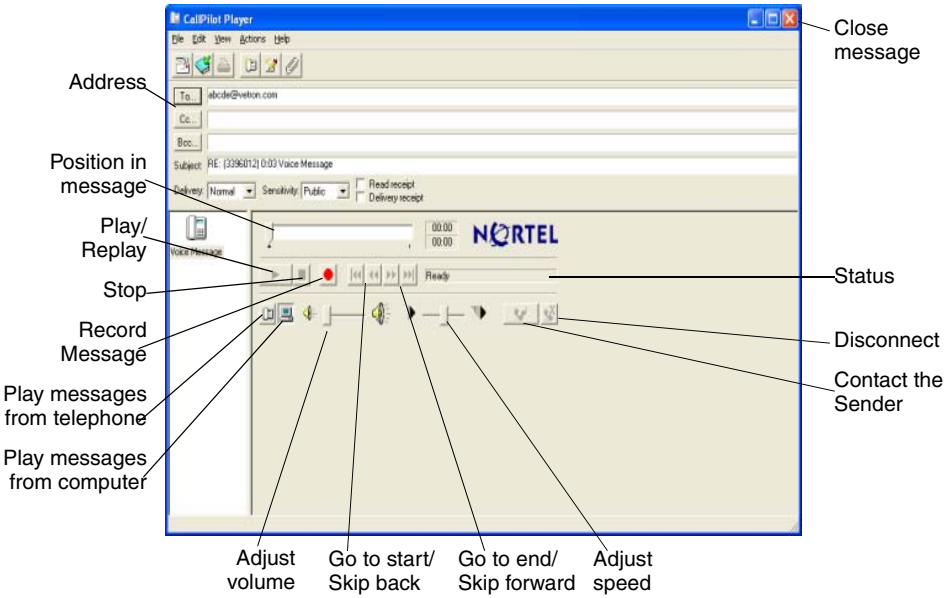
To play a message from your telephone

1. To play a voice message when your telephone is selected for playback, double-click the message in your CallPilot Inbox, and answer your telephone when the telephone rings.
2. Use the buttons on the CallPilot Player to play or stop the message, go backward and forward, and contact the sender.
3. When you are finished, hang up, and close the message.

To play a message from your computer

1. To play a voice message when your computer is selected for playback, double-click the message in your CallPilot Inbox. The message plays through your computer speakers or your headphones.
2. Use the buttons on the CallPilot Player to play or stop the message, go backward and forward, adjust the volume and speed, and contact the sender.

3 When you are finished, close the message.

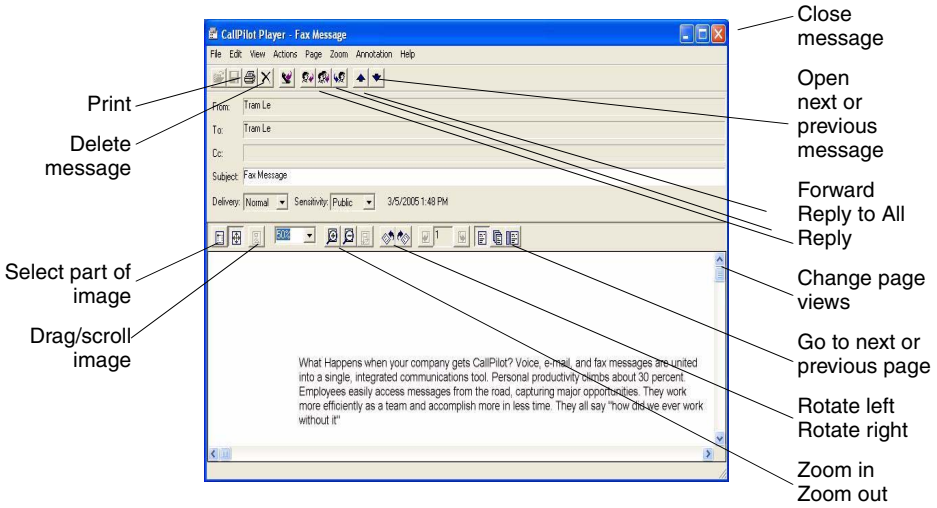


Viewing fax messages

Note: In order to receive faxes, your CallPilot administrator must enable fax capability for your mailbox.

To view a fax message

1. Double-click a fax message in your CallPilot Inbox. When you open a fax-only message, the fax image appears right away. In mixed voice, fax or text messages, click the **Fax** icon to view the fax.
2. While viewing the fax, you can enlarge or reduce the image, rotate or move the fax, print the fax, delete the fax, save the fax, add a voice annotation to the saved file, forward the fax, and reply to the fax.
3. When you are finished, close the message.


CallPilot Player - Fax Message
File Edit View Actions Page Zoom Annotation Help
From: Tram Le
To: Tram Le
Cc:
Subject: Fax Message
Delivery: Normal Sensitivity: Public 3/5/2005 1:48 PM
What Happens when your company gets CallPilot? Voice, e-mail, and fax messages are united into a single, integrated communications tool. Personal productivity climbs about 30 percent. Employees easily access messages from the road, capturing major opportunities. They work more efficiently as a team and accomplish more in less time. They all say "how did we ever work without it"
Print
Delete message
Select part of image
Drag/scroll image
Close message
Open next or previous message
Forward
Reply to All
Reply
Change page views
Go to next or previous page
Rotate left
Rotate right
Zoom in
Zoom out

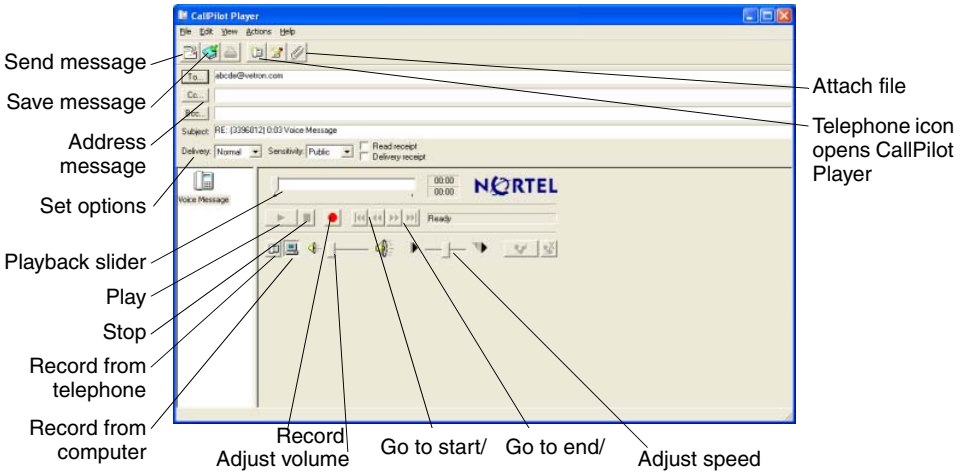
Composing voice messages

You can record a voice message from the computer or the telephone, then address and send the voice message, the same way as an e-mail message.

To record and send a voice message

1. In your CallPilot Inbox, click the **New CallPilot Message** icon .
2. On the new message form, click the **Telephone** icon in the toolbar to open the CallPilot Player, if the CallPilot Player is not already open.
3. On the CallPilot Player, click the red **Record** button to start recording.
4. ▸ If you are recording from the computer, record your message into the microphone. Click **Stop** to end the recording. Click **Play** to review it. To add to the recording, click **Record**, speak again, then click **Stop**.
   ▸ If you are recording from the telephone, answer when the telephone rings. At the tone, record your message. Click **Stop** to end the recording. Click **Play** to review it.
5. Click **To…** to address from the CallPilot, e-mail, or any Address Book. See *Addressing messages*, page 38. Or type a formatted address in the **To...** text box.
6. Add attachments and options if required. See *Adding attachments to messages*, page 35, and *Setting message options*, page 35.
7. On the toolbar, click the **Send Message** icon.

Note: Insure that rich text format (RTF) format is selected in your e-mail client, if plain text is selected the message delivery may fail.



To save a newly created voice message as a file

1. On a new message form, record a message, and on the File menu, click **Save as...**
2. In the File name box, type a name for the file, select a folder in which to keep the file, then click **Save**. Save voice files as .vbk files. Note: CallPilot automatically

converts .vbk files to .wav files, when sending to non-CallPilot users. See *Changing mail delivery settings*, page 51.

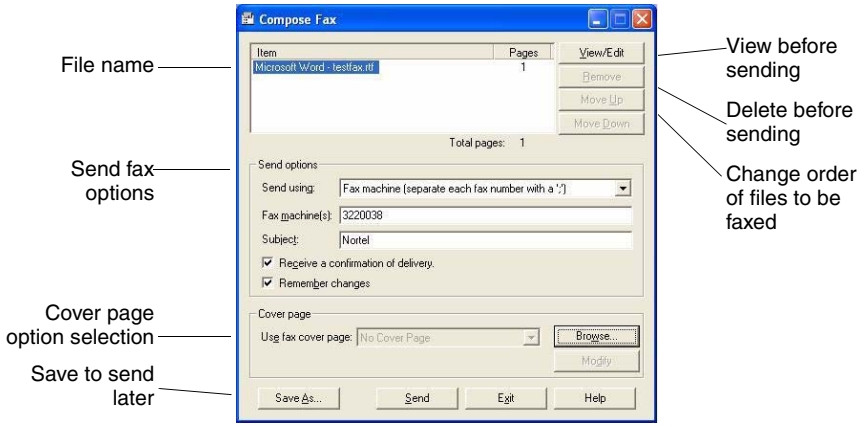
Composing fax and text messages

To create and send a single fax message

To create a fax, your CallPilot mailbox must have the fax capability enabled. The CallPilot recipients of your fax must also have fax capability to view the fax on their computer. If your recipients access their messages from their telephone, they can view the fax only by printing it. You can also send your fax to a fax machine.

1. Open the document that you want to fax. The document must be no greater than 8.5 in. (21.5 cm) in width.
2. On the File menu, select **Print**.
3. From the list of printers, select **Nortel Fax**, then click **Print** or **OK**.
4. The Compose Fax dialog box appears. Before sending the fax, you can add more documents by repeating steps 1 to 3. You can also choose to include a cover page, view the fax, and save the fax as a file for later transmission.
5. Select an appropriate **Send using...** option.

- To send a simple fax, type the fax machine numbers, or CallPilot mailbox number (append the letter “m” to the CallPilot mailbox number, for example, m7366), in the **Fax machine(s)** text box, type a subject in the **Subject** text box, then click **Send**.
- To send your fax as an attachment to a new CallPilot message, select **CallPilot Desktop Messaging for Microsoft Outlook** under **Send using**, then click **Send**.



A new message form opens with your fax file attached. Address the message from CallPilot, e-mail, or any Address Book. See *Addressing messages*, page 38. Or type the formatted address in the **To...** text box.

6. Add attachments and options if required. See *Adding attachments to messages*, page 35, and *Setting message options*, page 35.
7. Click **Send Message**.

To create and send a text message

To create a text message:

1. Open a new CallPilot message form.
2. Click the **Text** icon in the toolbar.
3. Type or paste plain text into the message.
4. Address the message.
5. Click the **Send Message** icon.

Creating and sending fax batch messages

To send customized CallPilot fax messages to multiple recipients, you can use Microsoft Word Mail Merge, and send your print job to the Nortel Fax Batch printer. You must be familiar with Microsoft Word Mail Merge functionality to use this feature. Consult your Microsoft Word documentation. Note that the CallPilot Fax Batch feature is only available to CallPilot Desktop and web users who install the Nortel Fax Batch Print Driver.

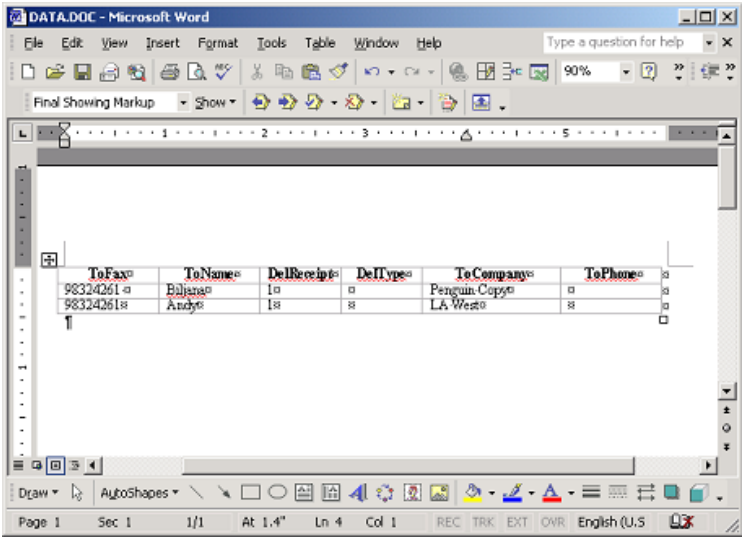
To use Mail Merge with CallPilot, you need your main document (the file you want to send to your recipients) and a data source document that contains recipient information, such as names and fax numbers.

Your CallPilot Desktop Messaging installation includes a sample Microsoft Word data source document named Data.doc and, a sample Microsoft Word main document named Sample.doc.

Accessing and modifying the sample Data source document

The Data.doc file consists of a Microsoft Word table, organized in columns, with one row for each recipient. The following column headers exist in the sample: ToFax, ToName, DelReceipt, DelType, ToCompany, and ToPhone. These column headers can be modified and deleted, and new columns can be added. The column header names serve as tags, which can be inserted into the main document, to customize the fax for each recipient, or to direct CallPilot how to handle the fax.

1 Go to \Program Files\Nortel\CallPilot\fax directory, and open the Data.doc file.



2 Add new columns or subtract existing ones, as required. For new columns, chose a meaningful column header name.

3 Add the required data under each column header. The data source can be created by any means available to populate a Microsoft Word table, including importing information from existing files.

If you edit the recipient list using the Mail Merge utility (that is, click Edit in the Data source section of the Microsoft Mail Merge Helper), the Data Form window opens and lists all the entries from the data source table. You can add, delete, modify, and search for records in this window. Any column headers that you added or modified in the data source file automatically appear in this window. Note that the **ToFax** text box is the only mandatory text box for CallPilot.

The following parameters and characters are supported in the **ToFax** text box:

- Maximum supported length for the fax phone number is 120 characters.
- Numbers 0 through 9 are supported.
- Uppercase and lowercase P and the comma is used when a pause is necessary.
- The Pound sign (#) is supported.
- Common phone number symbols such as left and right parentheses and the dash, are supported.
- Spaces are supported.
- When placed before a CallPilot mailbox number, to designate the mailbox address, the M is not case-sensitive.

The other text boxes are optional, and are used to customize, or to direct CallPilot how to handle, the fax. Three specific CallPilot text boxes and their parameters are:

- **ToName:** This is the fax recipient's name, and can be up to 256 characters in length.
- **DelReceipt:** You can use this tag to receive a Delivery Receipt in the form of a CallPilot message in your CallPilot mailbox, when the fax is delivered to the recipient. If the DelReceipt text box is set to 1, then a delivery receipt is generated. If DelReceipt is set to 0, a delivery receipt is not generated for that recipient. If the DelReceipt text box is empty, or the field is not in Data.doc, then no delivery receipt is generated.
- **DelType:** This text box is used to set a delivery priority for each recipient. If the DelType text box is set to 0 or is left empty (or if DelType Text Box is not present in your Data.doc), the message is tagged for Normal delivery. If DelType is set to 1, then the message is tagged for Economy delivery. If DelType is set to 2, then the message is tagged for Urgent delivery. Messages sent to non-CallPilot recipients with the Delivery Type set to Economy is delivered on a schedule defined by the CallPilot server for Economy delivery. Note that messages sent to CallPilot mailboxes are not affected by the Economy designation, and is sent as Normal messages. Transmission of messages tagged as Normal or Urgent begin immediately. The Urgent icon is displayed from My CallPilot or a Desktop Messaging

client and a voice prompt identifies the message as Urgent from the CallPilot telephone interface. Messages sent Urgent are treated as Normal when they are sent to non-CallPilot addresses.

4 When the table is updated, save all changes. You normally supply a unique name for your data file here; however, for the remainder of these procedures, the name Data.doc is used.

5 Close the document. The Data.doc file can now be used as a data source by Microsoft Mail Merge.

Accessing and modifying the sample Main document

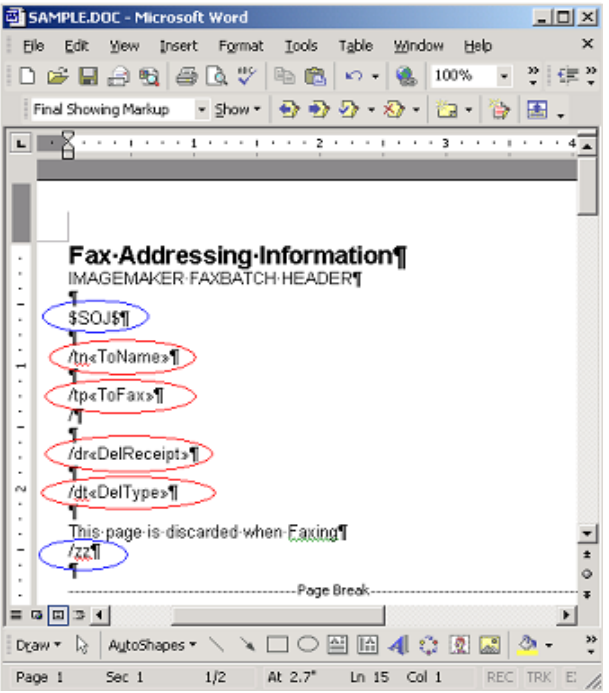
The Sample.doc file is an example of a Microsoft Word main document.

1 From the \Program Files\Nortel\CallPilot\fax directory, open Sample.doc in Microsoft Word.

This document contains tagged fields corresponding to those in the example Data.doc file. You can use the example Data.doc as a template for your own fax, or for practice purposes. If you modify the column header names in Data.doc, you must modify them in your main document as well.

First page

The first page of the main document is a special page, and does not become part of the final fax. Sample.doc is installed with the first page set up correctly.



The purpose of this page is to provide a location to map information in the data source to each customized fax document. To signal CallPilot that this is a Fax Batch file, and to prevent this page from becoming part of the fax, two special control codes **must** be present on the first page:

SOJ	Start of Job, signals the fax driver to start processing, and can be placed anywhere on the first page.
/zz	Start this page, prevents the first page from becoming part of the fax message, and can be placed anywhere on the first page.

The CallPilot Desktop software retrieves the Fax Number from the first page of the document. Additionally, CallPilot Desktop software retrieves the Recipient Name, the Delivery Receipt, and the Delivery Type, if they exist on the first page.

/tp	Fax Number, is used to address the message. **This text box is required.**
/dr	Delivery Receipt, is turned on or off for each recipient. **This text box is optional.**
/tn	Name of Recipient, is used to identify the record in the Nortel Fax Batch Status dialog if the fax number is either missing or invalid. **This text box is optional.**
/dt	Delivery Type, is used to mark messages for Normal, Economy or Urgent delivery. **This text box is optional.**

To complete the page, the Fax Number column header (that is, <<ToFax>>) must be inserted after the /tp control using the Mail Merge insert function. Also, the Delivery Receipt column header (that is, <<DelReceipt>>) can be inserted after the /dr control, the Name of Recipient text box (that is, <<ToName>>) can be inserted after the /tn control, and the Delivery Type text box (that is, <<DelType>>) can be inserted after the /dt control.

Note: all Fax Batch controls are case-sensitive.

As an advanced fax addressing feature, users can also modify all data in a single column, without actually modifying the data source file. For example, if an existing data source table contains fax numbers for a large number of recipients, but the external access number 9 is missing, this number can be added to all fax numbers by modifying the control on the first page of the document as follows:

/tp9<<ToFax>>

In this example, a 9 is added to the beginning of each phone number during fax batch processing. The data source remains unchanged, and can be used from a different location that does not require a 9 for external access.

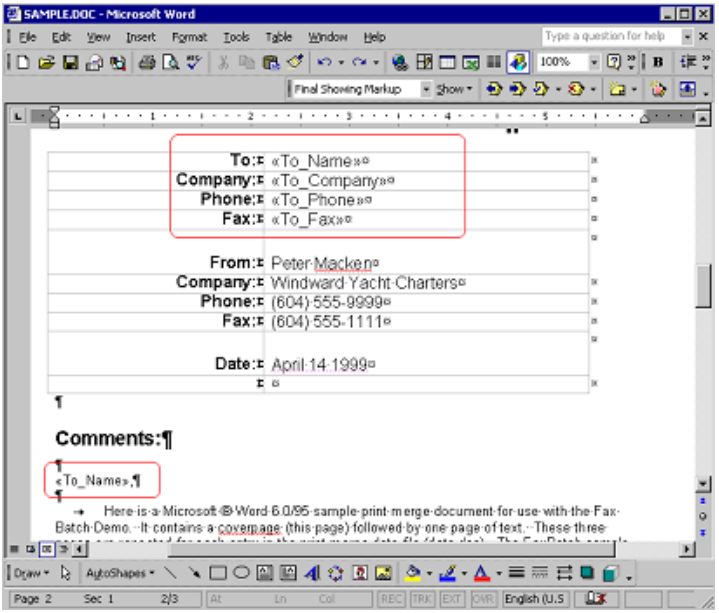
Second page

When the data source document and the first page of the main document are created, you can customize your fax.

Note: The page must be equal to, or less than, 8.5 inches in width.

You can use all of the data source column header tags to customize the document. The

following is an example using the Sample.doc file:



In this example, the document is customized for each recipient. Data source column headers are inserted into the document using the Microsoft Word Mail Merge utility. After the main document is customized, the document is ready to be merged with the information in the Data.doc file. Consult your Microsoft Word Mail Merge help for more details on inserting data source fields into the document.

Merging data from the data source into the Main document

When you are ready to merge data from the data source file into your main document:

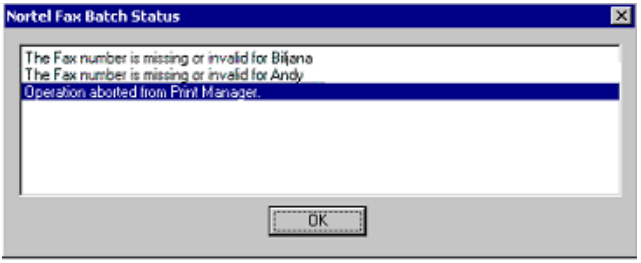
1. Start **Mail Merge** from the Microsoft Word **Tools** menu. Depending on which version of Microsoft Word you are using, Mail Merge is located under different menu headings.
   a. In the Office XP version, select **Tools> Letters and Mailings> Mail Merge Wizard**.
   b. In Office 2000 select **Tools> Mail Merge.**
2. Verify that Sample.doc is currently selected as the main document, and that Data.doc is currently selected as the data source.
3. Select **Merge to Printer,** and then select the **Nortel Fax Batch** driver from the **Print** dialog box that appears.
   Note: Ensure that Microsoft Word is not set up to print pages in reverse order.

4 Click **OK** in the Print dialog box to initiate the batch fax process.

When the document is merged, data values from the data source file are merged into the main document at the appropriate tag positions, and a separate fax TIF file for each recipient is created. CallPilot Desktop software addresses and transfer the fax files to the server. The CallPilot server is responsible for actually sending the fax to the recipients.

Once the process starts, the **Print Status** dialog box appears. The page number increases incrementally as each page is converted to a TIF file. Because the first page is skipped, this page is not included in the count. For example, if a three-page fax is sent to ten recipients, the dialog box displays "Printing page 1," "Printing page 2," and continues up to "Printing page 20." Only 20 pages are printed, because the first page of each document is skipped.

Problems that occur while creating the fax images, or with the fax addresses, are displayed in a separate Nortel Fax Batch Status dialog box:


Nortel Fax Batch Status
The Fax number is missing or invalid for Biljana
The Fax number is missing or invalid for Andy
Operation aborted from Print Manager.
OK

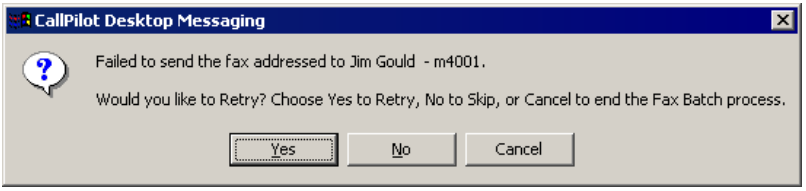
Problems, such as a missing fax address or an unsupported fax address format, is checked. However, problems such as a wrong fax number is not identified, provided the number is in a valid format. A wrong fax number, however, results in the sending of a non-Delivery receipt to the user's CallPilot mailbox by the CallPilot server.

When you click the **OK** button, the batch process ends, and no faxes are sent. You must fix the fax addresses, and resubmit the job.

If all faxes and addresses are created properly, a dialog box appears while the faxes are being addressed and transferred to the CallPilot Server. The Nortel Fax Batch Status dialog box indicates the status of the batch job. If you press **Cancel** in this dialog box before the job is completed, another dialog box appears, asking you to confirm the cancellation. If you select Yes, all temporary files are deleted, and the process ends. However, all faxes that are already transferred to the CallPilot server are sent.

If a problem occurs while transferring the fax, a dialog box similar to the following

appears:


CallPilot Desktop Messaging
Failed to send the fax addressed to Jim Gould - m4001.
Would you like to Retry? Choose Yes to Retry, No to Skip, or Cancel to end the Fax Batch process.
Yes
No
Cancel

If you select Yes, an attempt is made to resend the fax to the server. If you select No, the current fax is skipped, and processing begins on the next fax in the list. The skipped fax is not sent. If you select Cancel, another dialog box appears, asking you to confirm the cancellation. If you choose **Yes**, all temporary files are deleted, and the process ends. Any faxes already transferred to the CallPilot server are sent. If you choose **No**, the failure dialog box shown above is displayed again, allowing you to make a different choice.

A confirmation dialog box appears once all faxes have been submitted to the server.

Using custom fax Cover Pages

CallPilot users can choose to include a cover page with their faxes. The server administrator typically designs and manages these cover pages. The user simply chooses the desired style of cover page (if more than one is available).

Cover pages created with these tools include the following information:

From Information: Title Name Department Company
Phone number Fax number

To Information: Title Name Department Company
Phone number Fax number

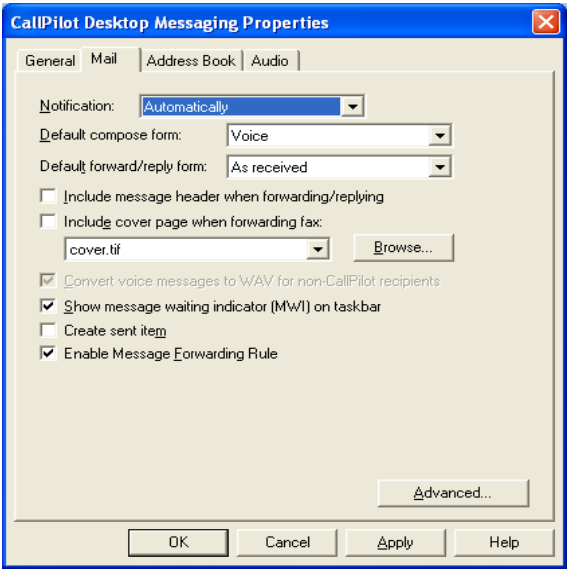
Number of Pages

Sent Date & Time

A Cover Sheet Memo section

CallPilot Configuration

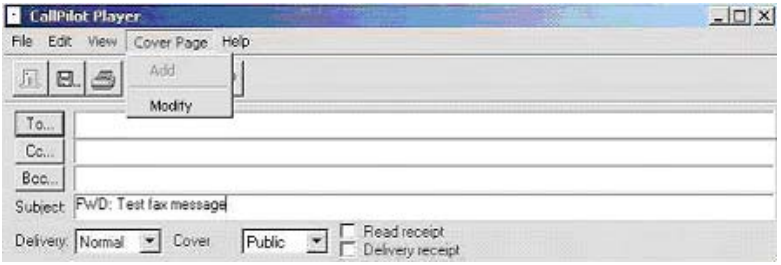
The Configuration page of CallPilot Desktop Messaging includes an option labeled **Include cover page when forwarding fax message**. The default value for Include cover page when forwarding fax message is unchecked, meaning that a cover page is not added to the message.



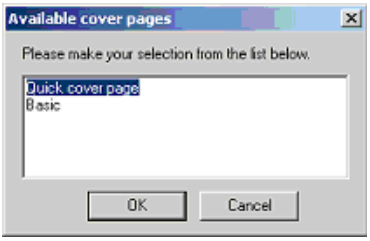
If you select this option, you can choose and set a default cover page from a list of available cover pages. Use the **Browse…** button to choose the location where the cover pages are stored. The default location is: \ \Program Files\Nortel\ CallPilot\cvrpages.

CallPilot Desktop Messaging Custom form

The Custom Fax Forward form of CallPilot Desktop Messaging contains a menu item named **Cover page**, which contains two submenus items: **Add** and **Modify**.

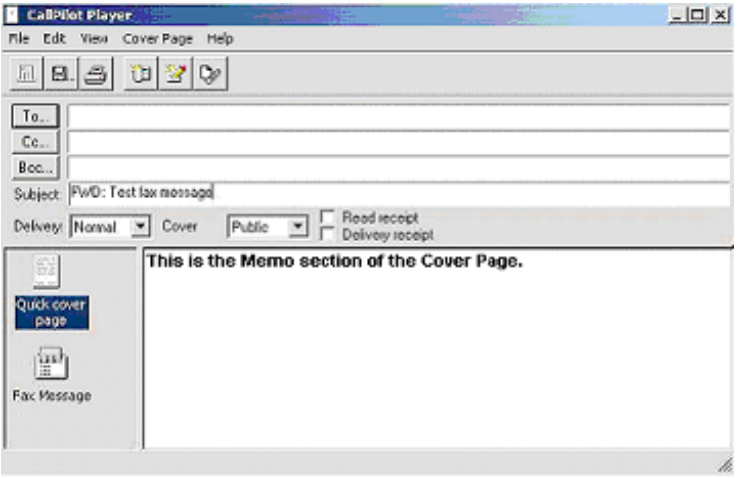


The **Add** menu displays a list of existing cover pages available to use. Select one of these, and click **OK**.



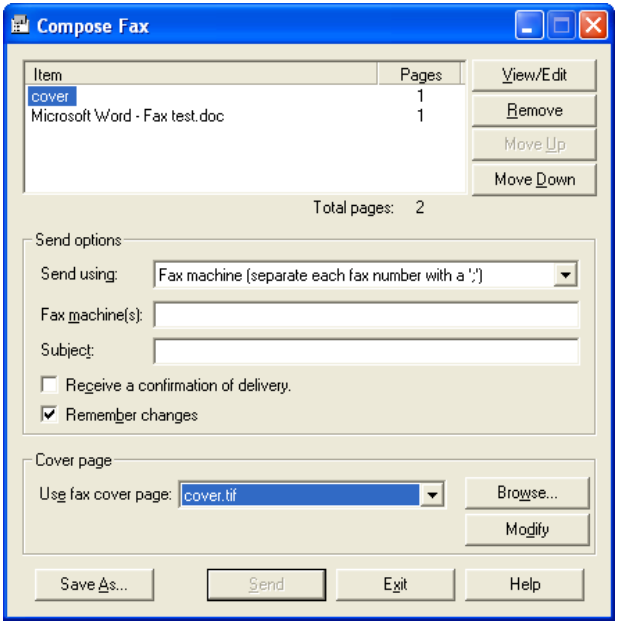
The **Modify** menu displays the current cover page content and allows you to modify the current cover page content. From the "Modify" window, you can also preview the current cover page.

If you enable the **Include cover page…** option, CallPilot Desktop Messaging adds the selected cover page to the Fax Forward form. The cover page appears as the first attachment on the list of attachments (left pane). The Attachment view (right pane) contains only the Cover Sheet Memo section of the cover page. You can include any additional required information here.



Nortel Fax Printer Driver form

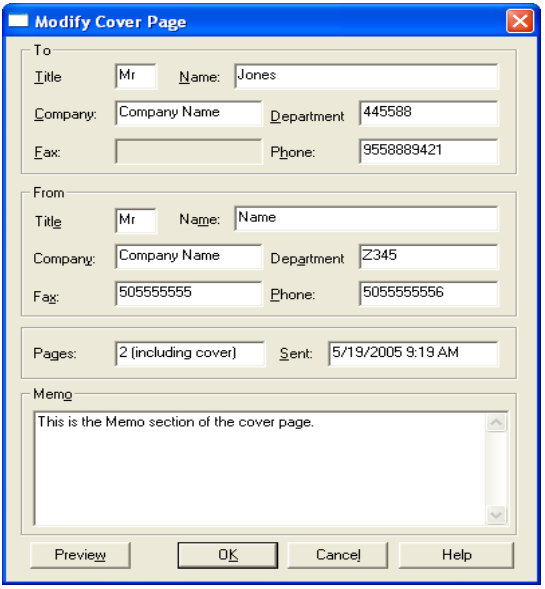
You can use the Nortel Fax Printer form to send a fax message, using either a CallPilot Desktop Messaging client (such as Microsoft Outlook) or the QuickFax feature. QuickFax allows you to send a fax directly from the **Print** dialog box. If you choose to send your fax using a CallPilot Desktop Messaging client, the cover page is available from the CallPilot Custom form.



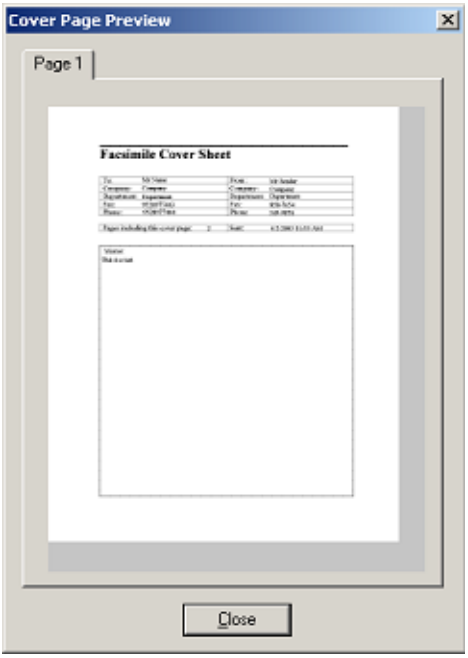
If you choose to send your fax to a specific destination (for example, a fax machine), the Cover page text box becomes active, and allows you to browse, through the use of the **Browse** button. You can select a cover page from the drop-down list. You can then modify the cover page contents. The modification of the cover page provides functionality similar to the Custom form. (Refer to Modify and Preview cover page for details.) You can also choose not to include a cover page by selecting the **No cover page** option from the **Use fax cover page** drop-down list.
Note that you can also include a Subject line in the **Subject** text box. The Subject line information appears in the e-mail portion of the fax, but not on the hard copy of the fax.

Modify and Preview cover page

You can preview the current cover page, and modify its contents, from both the CallPilot Custom form and the Nortel Fax Printer driver application.



Click **Preview** to view the current state of the cover page.



The first time you access this page, CallPilot Desktop Messaging attempts to fill in the From section using information from the registry. Desktop Messaging remembers the data that you entered into this section, and automatically completes those text boxes the next time you use this page. Although the From information is automatically populated from the registry, you can still change it.

In the **To** section, the Fax text box is always read-only. CallPilot populates the Fax text box using address information from the Custom or Fax Driver forms. The Name text box is read-only if the cover page is filled using the Custom form. In this case, CallPilot automatically fills the Name text box using the recipient's name. If you use the Fax Printer driver, this text box is left empty, and you can complete it.

If a cover page is used from the Fax Printer driver, CallPilot Desktop Messaging computes the number of pages, and enters this information in the Pages text box. When you use the Custom form, the Pages text box is left empty. You can modify this text box in either case.

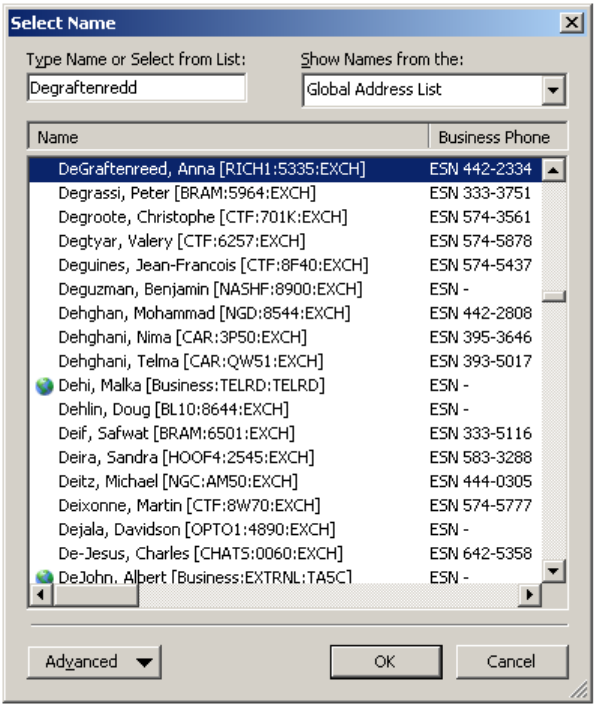
The Sent text box uses the current time and date by default. This text box is also editable. The Memo section is synchronized with the Memo section of the Custom form.

Note: The maximum length of the Memo text box is 2500 characters. The maximum length of the other cover page text boxes is 30 characters.

Initiating a call using Call Directory

The Call Directory feature allows you to call any person listed in any Address Book available to Microsoft Outlook. This includes the Global Address List, Outlook Contacts, and CallPilot Address Book.

To make a call, you select the **Call Directory** menu item from the **Tools**->**CallPilot Desktop Messaging Tools** menu, or press the **Call Directory** toolbar button. This brings up the Microsoft Outlook **Select Names** dialog box, which allows you to navigate all Address Books.


Select Name
Type Name or Select from List:
Degraftenredd
Show Names from the:
Global Address List
Name
Business Phone
DeGraftenreed, Anna [RICH1:5335:EXCH] ESN 442-2334
Degrassi, Peter [BRAM:5964:EXCH] ESN 333-3751
Degroote, Christophe [CTF:701K:EXCH] ESN 574-3561
Degtyar, Valery [CTF:6257:EXCH] ESN 574-5878
Deguines, Jean-Francois [CTF:8F40:EXCH] ESN 574-5437
Deguzman, Benjamin [NASHF:8900:EXCH] ESN -
Dehghan, Mohammad [NGD:8544:EXCH] ESN 442-2808
Dehghani, Nima [CAR:3P50:EXCH] ESN 395-3646
Dehghani, Telma [CAR:QW51:EXCH] ESN 393-5017
Dehi, Malka [Business:TELRD:TELRD] ESN -
Dehlin, Doug [BL10:8644:EXCH] ESN -
Deif, Safwat [BRAM:6501:EXCH] ESN 333-5116
Deira, Sandra [HOOF4:2545:EXCH] ESN 583-3288
Deitz, Michael [NGC:AM50:EXCH] ESN 444-0305
Deixonne, Martin [CTF:8W70:EXCH] ESN 574-5777
Dejala, Davidson [OPTO1:4890:EXCH] ESN -
De-Jesus, Charles [CHATS:0060:EXCH] ESN 642-5358
DeJohn, Albert [Business:EXTRNL:TA5C] ESN -
Advanced
OK
Cancel

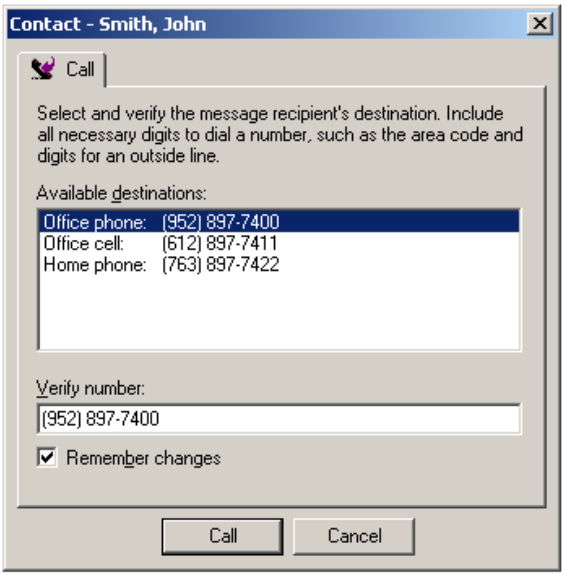
When a user is selected from the **Select Names** dialog box, CallPilot attempts to retrieve telephone numbers from the following fields:

- Assistant
- Business
- Business 2
- Car
- Home
- Home 2
- ISDN

- Mobile
- Other

Contact Verification

When CallPilot has extracted all valid telephone numbers, you are prompted to select and validate the telephone number, before a person is called. Any changes made to the number are cached in the registry, if **Remember changes** is selected.


Contact - Smith, John
Call
Select and verify the message recipient's destination. Include all necessary digits to dial a number, such as the area code and digits for an outside line.
Available destinations:
Office phone: (952) 897-7400
Office cell: (612) 897-7411
Home phone: (763) 897-7422
Verify number:
(952) 897-7400
Remember changes
Call
Cancel

If CallPilot cannot find any valid telephone numbers, then, depending on the client, only the person's e-mail address or name is listed. Because the e-mail address or name cannot be dialed, you must manually enter the person's complete telephone number. The number is cached in the registry, if **Remember changes** is selected.

Contacting the sender of a message

You can respond to a CallPilot message or an Microsoft Outlook message with a telephone call instead of a recorded message.

- When the sender of a message originates from within a Microsoft Exchange Server, the address is **known,** because the address is listed in your Address Book.
- When the sender of a message originates from an external SMTP server, the sender appears as **Unknown** in the Inbox and CallPilot form, regardless of whether the sender is listed in your Address Book.

Contacting the sender of a message when the address is known

1. Select a message in your CallPilot or Microsoft Outlook Inbox.
2. Click the **Contact Sender** toolbar icon. .

▸ Because the e-mail sender's Address Book entry can contain multiple numbers, all telephone numbers that can be found for the sender are presented to you in the **Contact** dialog box (see dialog box on page 33). Choose the appropriate number, and press the **Contact Sender** button. The CallPilot Desktop client attempts to remember changes you make, if you select the **Remember Changes** checkbox.

3. Answer the telephone when the telephone rings. CallPilot immediately calls the sender of the message.
4. When you finish the call, hang up the telephone, or click **Disconnect** .

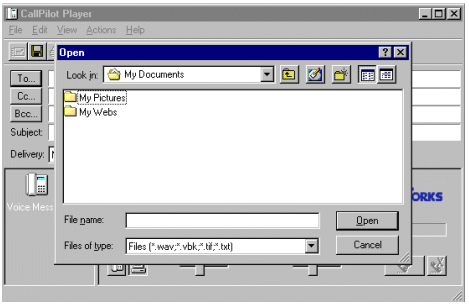
Note: User can contact the sender by e-mail, or choose a contact from any global or local address list, or a Microsoft Outlook contact.

Adding attachments to messages

Before sending a message, you can attach one or more voice, fax, or text files to it. Voice files can be .vbk or .wav format for CallPilot recipients; CallPilot can automatically convert .vbk files to .wav files when sending to non-CallPilot users. See *Changing mail delivery settings*, page 51. Fax files must be .tif format. Text files must be .txt format.

To attach a file to a message

1. On a new message form, click the **Attach File** icon.
2. In the **Open** dialog box, select or type the name of the files that you want to attach.
3. Click **Open** to attach the files, and to return to the new CallPilot message.



Setting message options

Before sending a message, you can set options for handling and delivery.

To set message options

1. On a new message form, select **Delivery, Sensitivity**, and **Receipt** options, as required.

- For **Delivery**, select **Urgent**, or leave the setting as **Normal**.
- For **Sensitivity**, select **Private**, or leave the setting as **Public**.

  Note that when you send a message marked **Private**, recipients can still forward the message to someone else, if they are not a CallPilot users. Also, recipients in non-CallPilot systems are not informed of Private settings. In your message, tell the recipients that the message is Private.
- For Receipt acknowledgment, check **Read receipt** to request acknowledgment that recipients opened the message. Check **Delivery receipt** to request acknowledgment that recipients received the message.

2. Continue to compose, address, and send the message as usual.

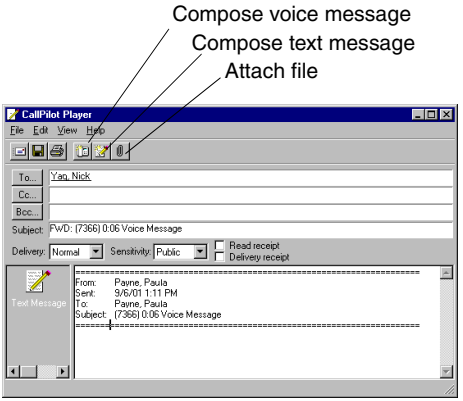
Forwarding and replying to messages

You can forward a message, and append an introduction to it. You can also compose a reply to the sender of a message, or to the sender and all recipients of a message.

To forward or reply to a message

1. In an open message, click **Forward, Reply** or **Reply to All.**

2. On the new message form, compose a voice, fax, or text message.
3. Address forwarded messages the same way as a new message. Replies are addressed automatically.
4. Add attachments, set options, and change the subject line if required.
5. Click the **Send Message** icon.



Note: Your administrator can block messages forwarded to external e-mail addresses.

Message Forwarding Rule

The Message Forwarding Rule can be configured by the system administrator or by the My CallPilot user. The Message Forwarding Rule feature enables you to automatically forward some or all of your CallPilot messages to an address configured by the system administrator. The user must enable the Message Forwarding Rule. If a message cannot be delivered the Message Forwarding Rule is disabled. Once the user receives notice of the undeliverable message, the Message Forwarding Rule, must again be enabled.

Messages forwarded from the CallPilot server are delivered to the e-mail account configured in the Message Forwarding Rule. You can treat these messages as any other e-mail. Messages can be forwarded, printed, saved, archived, deleted, and can have rules applied to them.

The Message Forwarding Rule must be configured to forward messages to the Microsoft Exchange Server if the messages are to appear in the Microsoft Exchange Server Inbox. Messages reside in the default message store defined by the user. The default message store is typically the Inbox folder on the Microsoft Exchange Server, or the Inbox folder in a local PST database file. Forwarded messages appear as Exchange e-mail messages, and honor all rules that apply to Outlook e-mail messages.

Note, however, that there are a few limitations when using the Reply/Reply All functionality. You cannot reply to messages from a sender whose address/CLID is not included in the message, because the address is unknown. Also, because the CallPilot server can accept only plain text messages and attachments of type VBK or TIF-F, you must ensure all outgoing messages addressed to a CallPilot address are composed using these types.

If a message is sent to a CallPilot address with a different attachment type, or in a format other than plain text (for example, RTF), you receive an Non-Delivery Notification (NDN). Note also that voice messages sent in VBK format play only if the CallPilot player is installed on the system. Voice messages sent in WAV format require a WAV player capable of playing standard WAV-PCM. Most standard WAV players support this format.

Forwarded CallPilot messages are accessible from Outlook Web Access. Forwarded messages honor all rules that apply to Outlook Web Access e-mail messages. The messages are displayed with regular Outlook Web Access e-mail icons, and the standard OWA e-mail form is used to display the message.

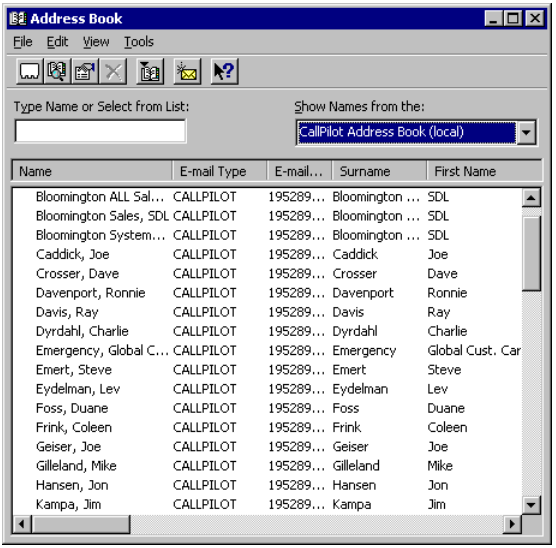
Note: In order to enable or disable Message Forwarding Rule from the desktop client interface you use your account information in the Address Book advanced section and not an anonymous log on.

Note: If the Exchange 6.5 server is used for outgoing SMTP messages, messages Are not marked as Read when they are opened by the recipient because the Read Receipt does not get sent back to CallPilot. You should either use **Forwarded by this Service** option or turn off **Mark original message as Read** option when configuring Message Forwarding Rules.

To address a message from an Address Book

You can address a CallPilot message from the Address Book on the server, or you can select addresses from any available Address Book.

- The CallPilot Address Book on the server is maintained by your organization, and contains the addresses of the CallPilot users and distribution lists that you are allowed to use. You cannot edit this list. You can download the Address Book to your computer so that you can work in offline mode. See *Changing your Address Book settings*, page 53.


Address Book
File Edit View Tools
Type Name or Select from List:
Show Names from the:
CallPilot Address Book (local)
Name E-mail Type E-mail... Surname First Name
Bloomington ALL Sal... CALLPILOT 195289... Bloomington ... SDL
Bloomington Sales, SDL CALLPILOT 195289... Bloomington ... SDL
Bloomington System... CALLPILOT 195289... Bloomington ... SDL
Caddick, Joe CALLPILOT 195289... Caddick Joe
Crosser, Dave CALLPILOT 195289... Crosser Dave
Davenport, Ronnie CALLPILOT 195289... Davenport Ronnie
Davis, Ray CALLPILOT 195289... Davis Ray
Dyrdahl, Charlie CALLPILOT 195289... Dyrdahl Charlie
Emergency, Global C... CALLPILOT 195289... Emergency Global Cust. Car
Emert, Steve CALLPILOT 195289... Emert Steve
Eydelman, Lev CALLPILOT 195289... Eydelman Lev
Foss, Duane CALLPILOT 195289... Foss Duane
Frink, Coleen CALLPILOT 195289... Frink Coleen
Geiser, Joe CALLPILOT 195289... Geiser Joe
Gilleland, Mike CALLPILOT 195289... Gilleland Mike
Hansen, Jon CALLPILOT 195289... Hansen Jon
Kampa, Jim CALLPILOT 195289... Kampa Jim

Your Microsoft Outlook Contacts is a list of e-mail addresses that you maintain on your computer. You can add CallPilot addresses to this list.

1. In a new CallPilot message, click **To...** .
2. In the **Show names** list, select **Microsoft Outlook Contacts.**
3. Select the name of the recipient or distribution list.
4. Click **To ->**. You can select one or more addresses, clicking **To ->** after each one.
5. Click **OK** to return to the new CallPilot message when the recipients are chosen.

E-mail addresses versus Fax/Telephone numbers

The CallPilot Desktop client always attempts to find a CallPilot or Microsoft Exchange Server address when sending a message to a recipient. Using either a CallPilot or Microsoft Exchange Server address is the safest mechanism for message transmission, because the entire message is sent without requiring, user interaction. However, if a

CallPilot or Microsoft Exchange Server address cannot be found, the Desktop client determines the message data type (voice, TIF, or text), and takes one of the following actions:

Mixed Media messages

If mixed media is detected (voice/TIF or voice/text; note that TIF/text is not considered mixed media), the message is sent to the recipient's e-mail address. If an e-mail address cannot be found, a Non-Delivery Notification (NDN) is generated for that recipient. The desktop client cannot send mixed media messages to a telephone or fax number.

Single Media messages

If voice only or tif/text only data is detected, the desktop client scans the recipient for an e-mail address, and telephone and fax numbers. The desktop client scans for telephone numbers if the data is voice only, or for fax numbers if the data is tif/text only.

If an e-mail address is found without telephone or fax numbers, the message is sent without additional user interaction. The system generates an NDN if it cannot locate an e-mail address, telephone number, or fax number.

If a telephone or fax number is found, the CallPilot Recipient dialog box is displayed, and you are prompted to choose the final destination. You must modify the selected number in the **Verify number** text box to ensure proper delivery. You can also choose an e-mail address (if available), but cannot modify it.

Validating Telephone and Fax Numbers

The original telephone or fax number can contain any alphanumeric character. This includes special dialing prefixes, such as + for international numbers, or abbreviations, such as ESN to denote internal calls. However, you must modify the selected number in the **Verify number** text box of the **CallPilot Recipient** dialog box to ensure proper delivery. The modified number can contain only the following alphanumeric characters:

Numeric characters 0123456789
Numeric delimiters ( ) -
Pause characters Pp,
Pound #
White space

The CallPilot Desktop client attempts to remember changes you make. This can prevent you from making the same changes each time the same telephone or fax number is used.

Note that the ability to dial any telephone or fax number can be restricted by the CallPilot server.

Note also that the ability to scan for telephone or fax numbers is only available in the CallPilot Custom form. The standard e-mail form does not scan for these numbers. If a CallPilot or e-mail address is missing from a recipient text box in the standard e-mail form, an NDN is generated for that recipient.

To address a message manually

You can type an address directly into the To text box of a new message. Enclose the address in square brackets. Refer to the Required format for a CallPilot E-mail address for the correct addressing formats.

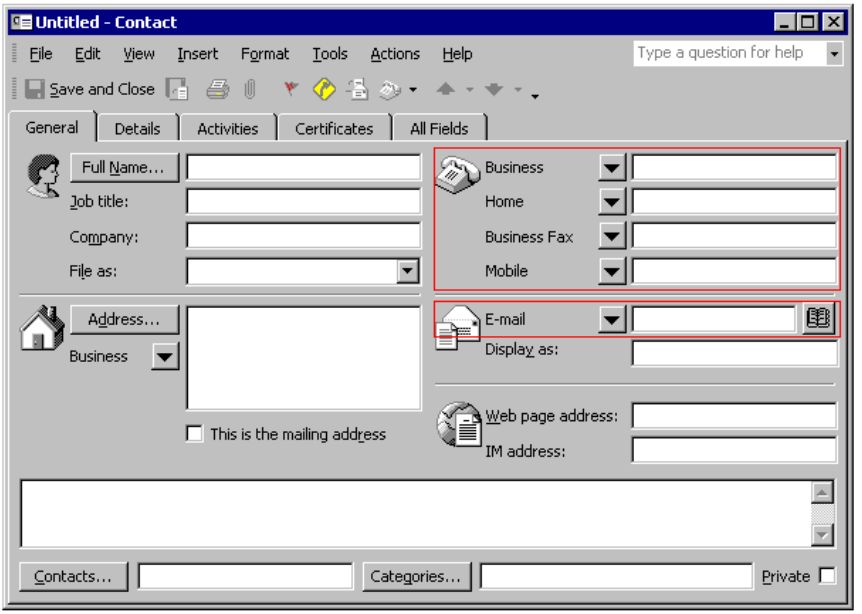
To add CallPilot addresses to your Outlook Contacts

You can add CallPilot addresses and distribution lists to your Outlook Contacts. You can choose to distinguish between CallPilot and e-mail addresses by adding the word CallPilot after the recipient's name.

1 Open the Address Book from Microsoft Outlook, and click on the **New Entry** toolbar icon.

2 You then are prompted to select the entry type. Select **New Contact** to create a new entry in the Microsoft Outlook Address Book.

- A new **Untitled - Contact** dialog box is displayed. CallPilot uses two text boxes: contact information and e-mail.



3 You can choose to enter a CallPilot address in the E-mail text box, fax, or telephone numbers in the contact text boxes. You can fill in all text boxes; however, the desktop client ignores all fax and telephone numbers, if the E-mail text box contains a Microsoft Exchange Server or CallPilot Server address.

Resolving an unknown address

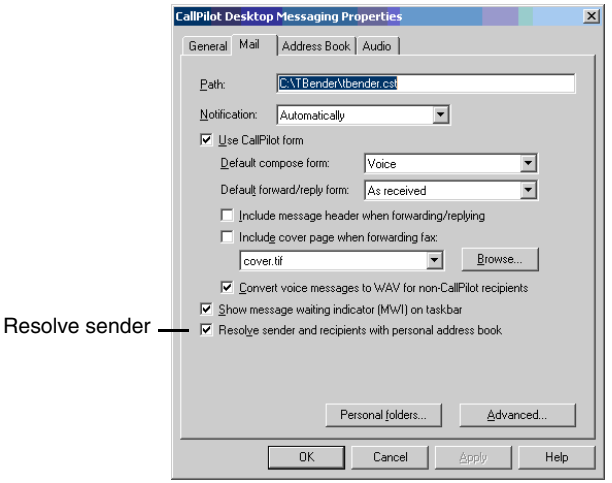
Before you can send a message to an address that appears **Unknown**, you must find

the name of the sender. To do this, use the feature **Resolving Addresses.**

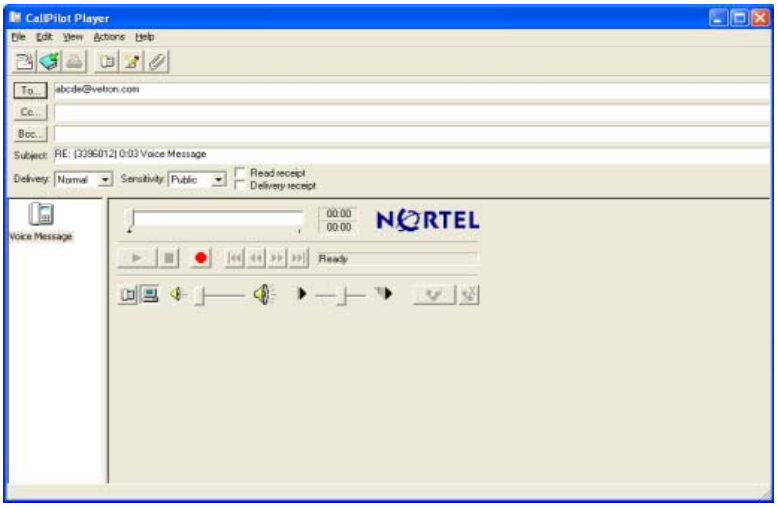
To activate Resolving Addresses functionality in CallPilot Desktop Messaging

To activate **Resolving Addresses** functionality in CallPilot Desktop Messaging, check the **Resolve sender and recipients with personal Address Book** option.

Use the **Mail** tab of the **CallPilot Desktop Messaging Properties** dialog box for this.

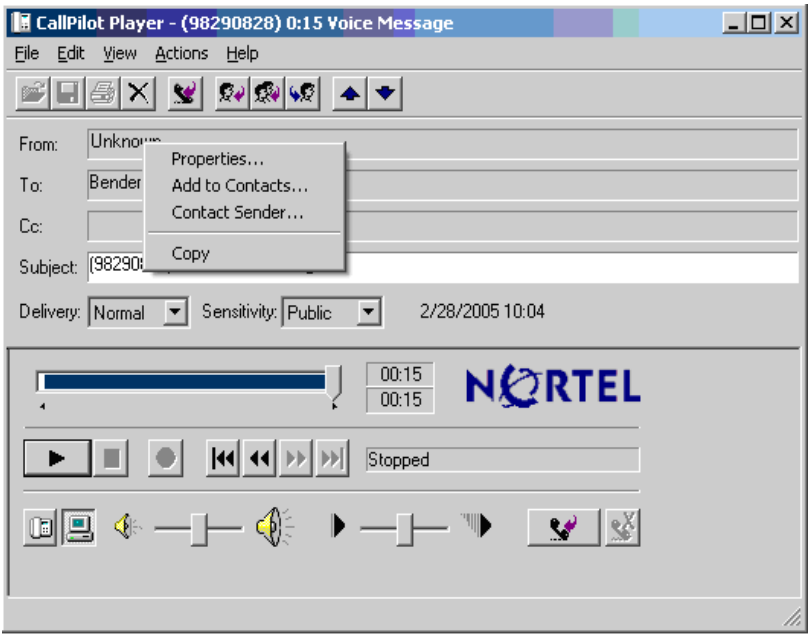


Now, when you receive an incoming message, the system searches your Outlook Contacts to determine if that sender is listed. If the system finds the address of the sender, the display name appears in your Inbox and CallPilot form. You can contact the sender by following the steps for **Contacting a sender of a message when the address is known**.



To add a sender to your Outlook Contacts

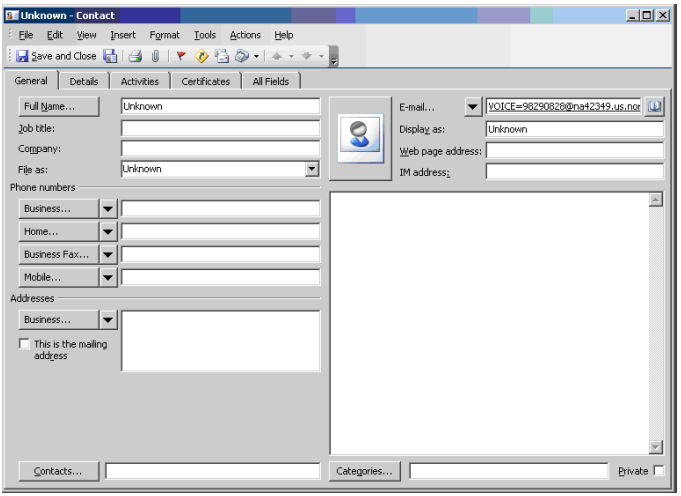
If the sender is not in your Outlook Contacts, the display name appears as **Unknown**. You can add a sender to your Outlook Contacts.



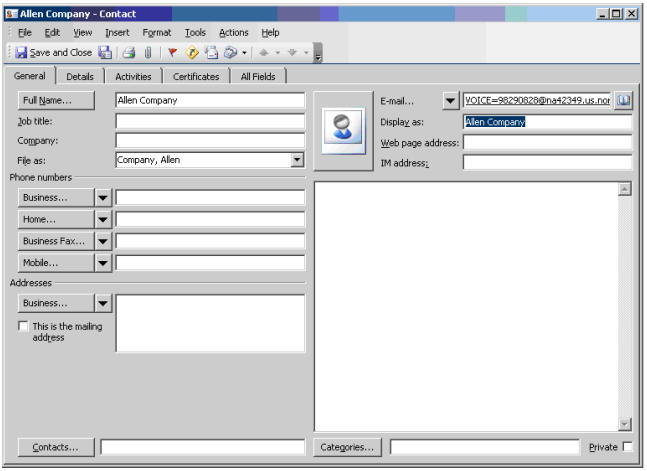
1 **Right-click** in the **From** field that contains the word “Unknown” in the dialog box CallPilot Form with Unresolved Sender. Four options appear:

- **Properties...** display the sender Properties
- **Add to Contacts...** add a new contact
- **Contact Sender...** display the Contact dialog box, and call or send an instant message to the sender
- **Copy...** copy the sender name to the clipboard

2 Select **Add to Contacts...** to add the sender to your Outlook Contacts. The contact window box appears.



3 Insert the name of the sender.



4 Select **Save** and **Close**. The new contact is added to your contact list with the name of the sender. Your Inbox is also updated to show the contact name that you entered.

Required format for a CallPilot E-mail address

If you choose to enter a CallPilot address in the E-mail text box, enter the address in the following format:

[CALLPILOT:XXXXYYYY@ZZZZ]

Where:
XXXX = VPIM network shortcut
YYYY = CallPilot Mailbox number
ZZZZ = CallPilot Server FQDN (server and domain)

For example, suppose CallPilot server na42349 in the domain us.nortel.com with VPIM network shortcut 1952897 contains mailbox 7404. Then the CallPilot address for that mailbox is:

[CALLPILOT:19528977404@na42349.us.nortel.com]

Required format for Fax and Telephone Numbers

If you choose to enter a fax or telephone number in the contact field(s), it must be entered as an alphanumeric string. Pause (P p ,) and pound (#) characters are supported.

The required format for fax is:

[CALLPILOT:FAX=XXXX@ZZZZ]

The required format for voice is:

[CALLPILOT:VOICE=XXXX@ZZZZ]

Where:
XXXX = Telephone or fax number
ZZZZ = CallPilot Server FQDN (server and domain)

Examples of valid fax and telephone number formats are:

[CALLPILOT:7404@na42349.us.nortel.com]
[CALLPILOT:(416) 697-4545@na42349.us.nortel.com]
[CALLPILOT:(416) 697-4545,7404@na42349.us.nortel.com]
[CALLPILOT:(416) 697-4545p7404@na42349.us.nortel.com]
[CALLPILOT:(800) 921-1342#123123@na42349.us.nortel.com]

Microsoft Outlook supports telephone and fax contact numbers for business, home, car, etc. Some contact numbers are not supported. Note that contact numbers are a feature of Microsoft Outlook; CallPilot Desktop Messaging cannot hide or alter unsupported items. The supported and unsupported numbers are shown as follows:

- Valid Voice Contact Numbers: Assistant; Business; Business 2; Car; Home; Home 2; ISDN; Mobile; and, Other valid fax contact numbers
- Valid Fax Contact Numbers: Business fax; Home fax; and, Other fax
- Unsupported Contact Numbers: Callback; Company; Pager; Primary; Radio; Telex; and, TTY/TDD

Personal Distribution Lists

There are two types of Personal Distribution Lists (PDL) you can use:

- CallPilot PDL, which can be created using My CallPilot or the telephone
- Local distribution lists, which can be created from Microsoft Outlook Contacts. Note that this type is not accessible from telephone interface.

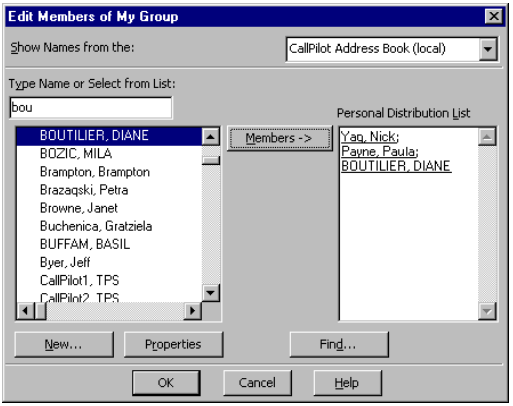
To use existing CallPilot personal distribution lists

You can address messages using CallPilot Personal Distribution Lists that you create in My CallPilot or on your telephone. In Outlook, select these lists from the CallPilot Address Book.

To create a personal distribution list in Outlook

You create a CallPilot Personal Distribution Lists in Outlook the same way that you create an e-mail personal distribution list. When you create a list, the e-mail personal distribution list appears in your-mail Contacts. so that you can select the list to address a message. You cannot access a list created in Outlook from your telephone or from My CallPilot.

1. In your Inbox, on the **Tools** menu, click **Address Book**.
2. Click **New Entry** and select **Contacts.**
3. Select **New Distribution List**, and click **OK**.
4. In **Untitled-Distribution List**, in **Name**, type a list name.
5. Click **Select Members…** to display Edit New Distribution List Members.
6. Scroll to CallPilot Address Book and select it. Select names to add to the Distribution List, clicking **Members ->** after each name.
7. Click **OK** when you finish entering names.
8. Click **OK** after viewing the list.
   You can add or delete names for this list at any time.



Instant Messaging

The Instant Messaging feature allows you to start an Instant Messaging (IM) session through **Microsoft Windows> MSN Messenger** and **Nortel Multimedia PC Client (MCS 5100)** from a CallPilot or e-mail message.

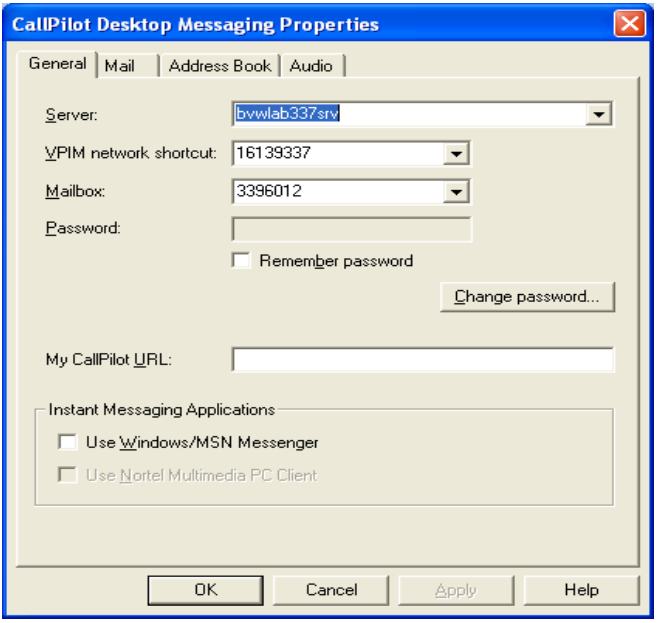
You can initiate an Instant Messaging connection with other users, provided both parties have a valid account on MCS 5100 (Nortel Multimedia PC Client), or with one of the following services available in **Windows> MSN Messenger**:

- NET Passport Service (Windows> MSN Messenger)
- SIP Communication Service (Windows Messenger)
- Exchange Instant Messaging Service (Windows Messenger)

There are no special requirements to configure these services. You must configure these accounts according to Windows/MSN Messenger requirements. For the SIP Communication Service on MCS 5100 configuration, you must have a configured and fully-operational Nortel Multimedia PC Client to be able to use its Instant Messaging functionality.

To activate Instant Messaging functionality in CallPilot Desktop Messaging

To activate Instant Messaging in CallPilot Desktop Messaging, you must select which IM applications to use. Use the **General** tab of the **CallPilot Desktop Messaging** Properties dialog box.

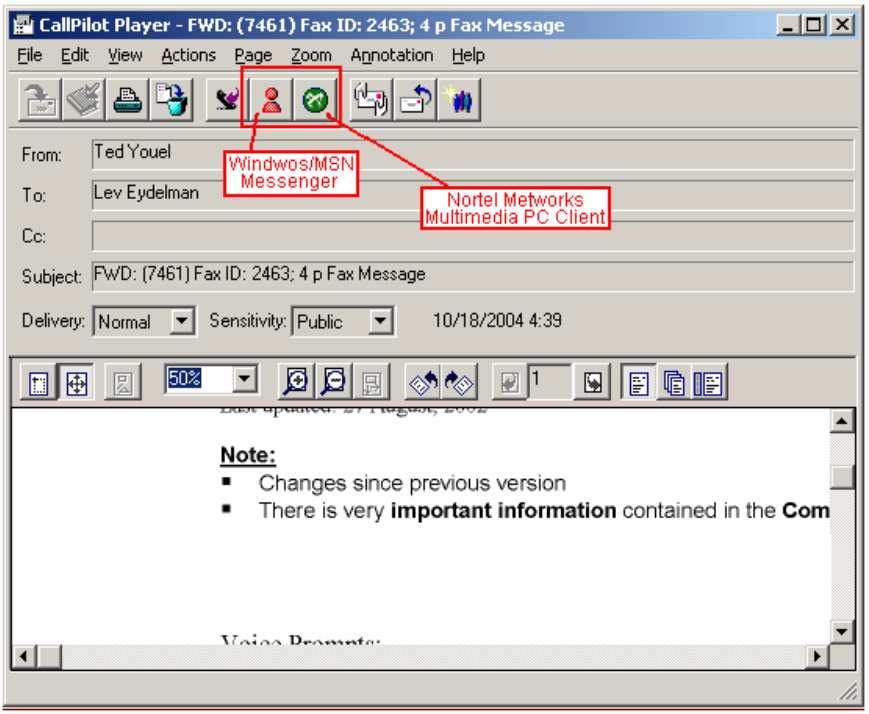


- By default, both applications are not selected. You cannot select an application

that is not installed on your PC.

Using Instant Messaging from the CallPilot Form

You can initiate an instant messaging session through the CallPilot Form. When the CallPilot Form is open, choose the **Contact Sender** menu item from the **Actions** menu, or click one of the **CallPilot Form** toolbar buttons.


CallPilot Player - FWD: (7461) Fax ID: 2463; 4 p Fax Message
File Edit View Actions Page Zoom Annotation Help
From: Ted Youel
To: Lev Eydelman
Cc:
Subject: FWD: (7461) Fax ID: 2463; 4 p Fax Message
Delivery: Normal
Sensitivity: Public
10/18/2004 4:39
Windwos/MSN Messenger
Nortel Metworks Multimedia PC Client
Note:
Changes since previous version
There is very important information contained in the Com

When Contact Sender is chosen, CallPilot retrieves the message sender's CallPilot address. You are prompted to validate the address in the **Contact** dialog box.

Note: The icons on the toolbar Instant Messaging buttons are different colors, depending on the online status of the sender. These are as follows:

Online Offline Status or sender Sign In name Unknown to Windows/MSN Messenger

Online Offline Status or sender Sign In name Unknown to Nortel Multimedia PC Client (MCS5100)

Tool tips for Instant Messaging buttons also show sender's Sign In name and online status, if this information is available.

Using Instant Messaging from Microsoft Outlook

You can initiate an Instant Messaging session by selecting a message and choosing the **Contact Sender** menu item from the **Tools**->**CallPilot Desktop Messaging Tools** menu.

When **Contact Sender** is chosen, CallPilot retrieves the message sender's CallPilot or e-mail address. You are prompted to validate the address in the **Contact** dialog box.

Contact dialog box

With the CallPilot **Contact** dialog box, you can initiate an Instant Messaging session by using **Windows Messenger** / **MSN Messenger** application, or by using the **Nortel Multimedia PC Client (MCS 5100)**.

The **Contact** dialog box displays your Contacts list from either Windows/MSN Messenger application or the Friends list from Multimedia PC Client.

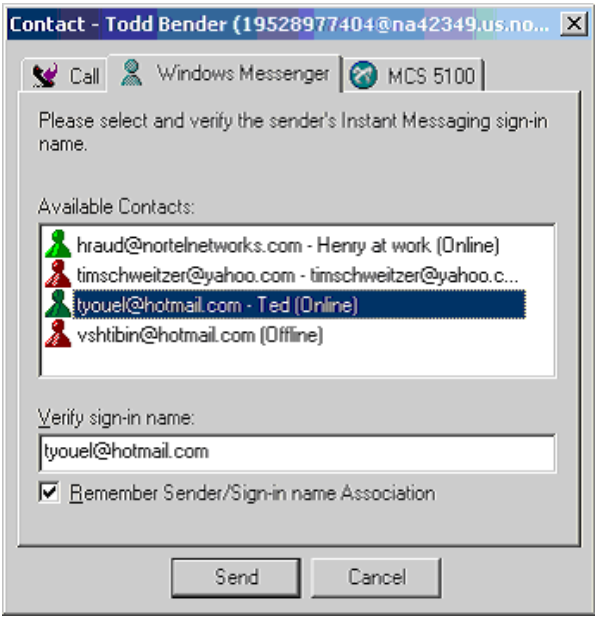
Both **Windows Messenger / MSN Messenger** application and the **Nortel Multimedia PC** Client require the sender's Sign In name to be present in the **Contacts> Friends** list before initiating an Instant Messaging session.

The sender's CallPilot or e-mail address that is extracted from the message is treated as the sender's Instant Messaging Sign In name. The **Contact** dialog box attempts to find the sender's Sign In name in the appropriate list. If the search is successful, the Verify sign in name text box is prefilled. Otherwise the text box is left empty and you must manually enter the sender's Sign In name.

You are always prompted by the **Contact** dialog box to validate the sign in name before starting an Instant Messaging session. Any changes made to the number are cached in the registry, if Remember changes is selected.

After verifying the sign in name, click the **Send** button. If the Sign In name is already in the contact list, the **Windows Messenger / MSN Messenger**, or the **Nortel**

Multimedia PC Client Conversation window, is displayed.



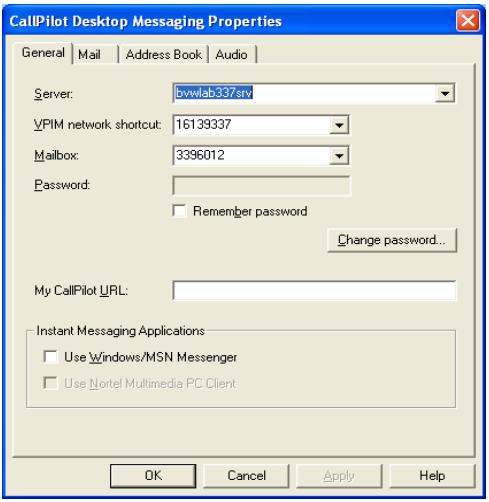
This window provides the interface for sending and receiving instant messages.

If the Sign In name does not exist in your **Contact> Friend** list, CallPilot Desktop Messaging attempts to add it. If the name is successfully added, you receive a confirmation. You can then click the **Send** button to display the **Windows Messenger / MSN Messenger** or **Nortel Multimedia PC Client Conversation** dialog box. If the name is not added successfully, the Instant Message is aborted.

Changing your mailbox settings

To view or change your CallPilot access settings

1. In your e-mail Inbox, on the **Tools** menu, click **Services** (or **E-mail accounts** if you are using XP), and open **CallPilot Desktop Messaging configuration**. (Or, on the CallPilot form, select **View > Options**.)
2. Click the **General** tab to display your current access settings.
3. Make any changes required, then click **OK**.



To change your CallPilot password

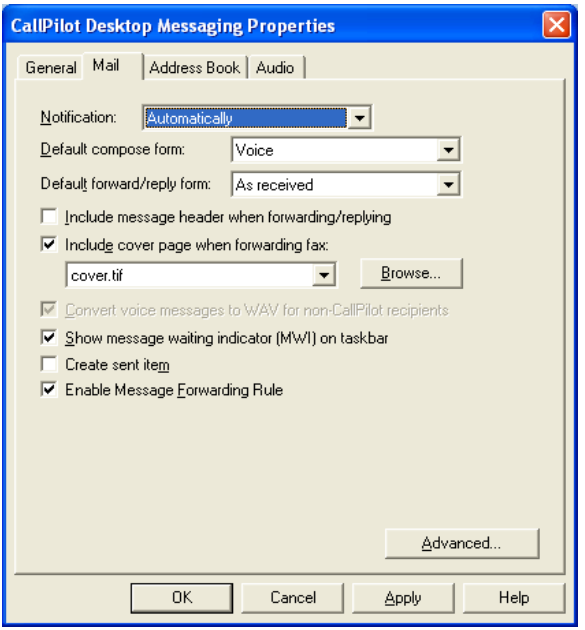
This is the same password that you use from the telephone.

1. Repeat steps 1 and 2 above, then click **Change Password**.
2. In the **Old password** text box, type your current password.
3. In the **New password** text box, type your new password.
4. In the **Retype new** text box, type your new password again.
5. Click **OK** to save the change.
6. Click **OK** to exit the General settings.

Changing mail delivery settings

To view or change your mail settings

1. In your e-mail Inbox, on the **Tools** menu, click **Services** (or **E-mail accounts** if you are using XP), and open **CallPilot Desktop Messaging configuration**.
2. Click the **Mail** tab to display the current mail settings.



3. The default settings shown here are recommended for most users:

- Include the path or location of the database file used to store CallPilot messages on your computer.
- Choose automatic notification, manual notification, or a timed delay notification. Choose Manually to save costs on lone distance or ISDN connections.
- Enable CallPilot messages to appear on a CallPilot form instead of an e-mail form.
- Include message header when forwarding/replying — Header information of the original message appears in a reply or forwarded message.
- Include cover page when forwarding a fax — see *CallPilot Configuration section on page 27* for information on adding or modifying cover pages.
- Convert voice messages to WAV for non-CallPilot recipients - Recorded messages are automatically converted from .vbk to .wav files when you send them to non-CallPilot users.
- Show message waiting indicator (MWI) on taskbar - CallPilot telephone icon on the Windows taskbar turns red when you have a new message.

- Enable Message Forwarding Rule - enables the forwarding of messages as defined by the CallPilot Administrator. If the Message Forwarding Rule feature is not activated for the user, the checkbox does not appear.

  Note: If you have access to My CallPilot, you can create, edit and delete your own Message Forwarding Rule. Refer to the My CallPilot User Guide for details.

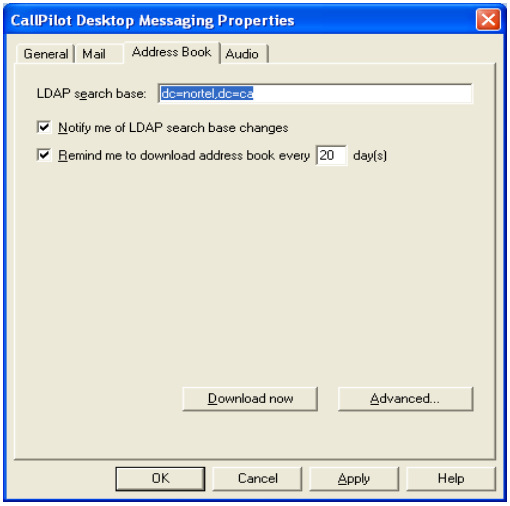
4 Make any changes required, then click **OK.**

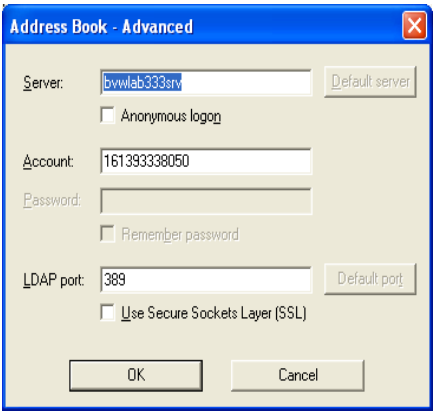
Changing your Address Book settings

To view or change your Address Book settings

Your administrator enters the default Address Book settings for you. You can change the Address book settings, if required. Refer to the online Help for a detailed explanation

1. In your e-mail Inbox, on the **Tools** menu, click **Services** (or **E-mail accounts** if you are using XP), and open **CallPilot Desktop Messaging configuration**.
2. Click the **Address Book** tab to display the current Address Book settings.
3. Make any changes required, then click **OK**.





To use the Anonymous logon

You can logon as an anonymous user

1. Click on the **Advanced...** button on the CallPilot Desktop Messaging Properties.
2. The Address Book - Advanced dialog box opens, select **Anonymous logon**.
3. Click **OK**.

Note: When anonymous logon is **unchecked**, the desktop client also downloads BDL's, SDL's, and user PDL's as part of the Address Book download. When anonymous logon is **checked**, BDL's, SDL's, and user PDL's are skipped. The total number of Address Book entries downloaded may be different, dependant on the anonymous logon selection.

To download the Address Book to your computer

You can download the CallPilot Address Book from the server to your computer so that you can work offline.

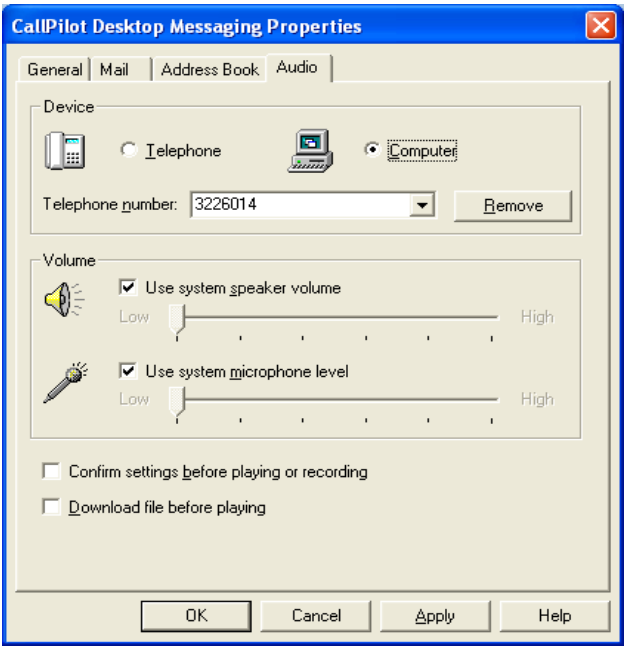
1. Select the **Address Book** tab as described previously.
2. Click **Download now**. The server Address Book downloads to your computer.
3. Select **Use local Address Book**. From now on, when you click **To…** in a CallPilot message, whether working online or offline, you go to the Address Book that you downloaded to your computer.
4. Check the **Remind me...** checkbox and set the number of days between reminders.
5. Click **OK**.

Changing audio settings

To change the audio device and volume

You can play and record your messages from your telephone or your computer.

1. In your e-mail Inbox, on the **Tools** menu, click **Services** (or **E-mail accounts** if you are using XP), and open **CallPilot Desktop Messaging configuration**. (Or, on the CallPilot Player, select **View > Options**.)
2. Click the **Audio** tab to display the current Audio settings.



3. In **Device**, click **Telephone** if you want to play and record your voice messages from your telephone. Ensure the correct telephone number appears.
   Or, click **Computer** if you want to play and record your voice messages through your computer speakers and microphone.

   Note: You can also change your audio device on the CallPilot Player.
4. In **Volume**, check the **Volume** and **Level** check boxes if you want to coordinate your CallPilot volume settings with your computer speaker and microphone volumes.
5. If you want a reminder to check these settings before playing or recording voice messages, check **Confirm settings...** .
6. If you want to download voice messages to your computer before playing them, check **Download file...** This option is useful if you use a modem.

Linking to My CallPilot

Desktop Messaging provides links to the web-based resources in My CallPilot. To view or change the URL for My CallPilot, see *Changing your mailbox settings*, page 50. For more information on My CallPilot, refer to the My CallPilot User Guide (555-7101-426).

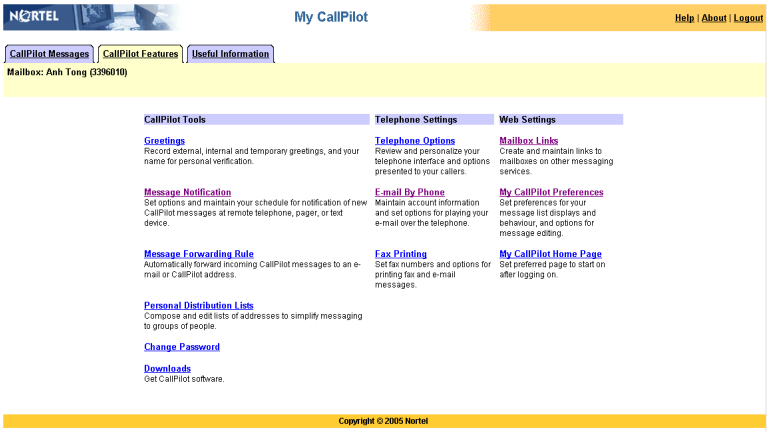
1 In your e-mail Inbox, on the **Tools** menu, click **CallPilot Desktop Messaging Tools > My CallPilot**.

2 Select one of the tabs.

Note: You can also access My CallPilot from the View menu of the CallPilot Player.

To view or change your CallPilot feature settings

1 In My CallPilot, click the **CallPilot Features** tab.

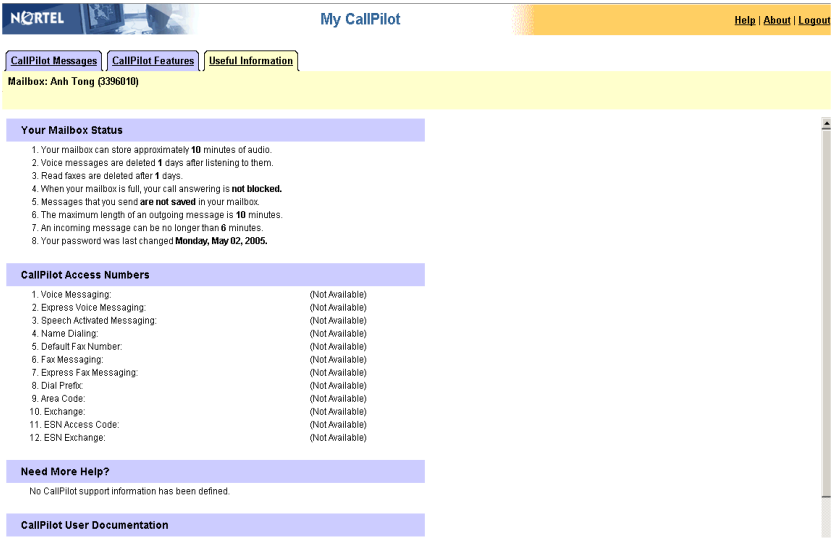

My CallPilot
Help | About | Logout
CallPilot Messages
CallPilot Features
Useful Information
Mailbox: Anh Tong (3396010)
CallPilot Tools
Telephone Settings
Web Settings
Greetings
Record external, internal and temporary greetings, and your name for personal verification.
Telephone Options
Review and personalize your telephone interface and options presented to your callers.
Mailbox Links
Create and maintain links to mailboxes on other messaging services.
Message Notification
Set options and maintain your schedule for notification of new CallPilot messages at remote telephone, pager, or text device.
E-mail By Phone
Maintain account information and set options for playing your e-mail over the telephone.
My CallPilot Preferences
Set preferences for your message list displays and behaviour, and options for message editing.
Message Forwarding Rule
Automatically forward incoming CallPilot messages to an e-mail or CallPilot address.
Fax Printing
Set fax numbers and options for printing fax and e-mail messages.
My CallPilot Home Page
Set preferred page to start on after logging on.
Personal Distribution Lists
Compose and edit lists of addresses to simplify messaging to groups of people.
Change Password
Downloads
Get CallPilot software.
Copyright © 2005 Nortel

2 Select any feature, and make changes to your setup, as required. Any changes you make to a feature take effect immediately, whether you use CallPilot from your computer or from your telephone.

To view user information

In My CallPilot, click the **Useful Information** tab to view online user information

specific to your mailbox.


My CallPilot
Help | About | Logout
CallPilot Messages
CallPilot Features
Useful Information
Mailbox: Anh Tong (3396010)
Your Mailbox Status
1. Your mailbox can store approximately 10 minutes of audio.
2. Voice messages are deleted 1 days after listening to them.
3. Read faxes are deleted after 1 days.
4. When your mailbox is full, your call answering is not blocked.
5. Messages that you send are not saved in your mailbox.
6. The maximum length of an outgoing message is 10 minutes.
7. An incoming message can be no longer than 6 minutes.
8. Your password was last changed Monday, May 02, 2005.
CallPilot Access Numbers
1. Voice Messaging: (Not Available)
2. Express Voice Messaging: (Not Available)
3. Speech Activated Messaging: (Not Available)
4. Name Dialing: (Not Available)
5. Default Fax Number: (Not Available)
6. Fax Messaging: (Not Available)
7. Express Fax Messaging: (Not Available)
8. Dial Prefix: (Not Available)
9. Area Code: (Not Available)
10. Exchange: (Not Available)
11. ESN Access Code: (Not Available)
12. ESN Exchange: (Not Available)
Need More Help?
No CallPilot support information has been defined.
CallPilot User Documentation

Working offline

To work offline, you require a computer that has CallPilot installed and configured in the same way as your office computer. You can download your messages and addresses to this computer before working offline.

1. (Optional) You can download your CallPilot messages to the computer that you use offline. Log in to your e-mail and CallPilot. On the **Tools** menu, click **CallPilot Desktop Messaging**, then click **Download all CallPilot Messages**. When your messages are downloaded, log out.
2. (Optional) You can download the server Address Book to your computer. See *Changing your Address Book settings*, page 53.
3. Open your e-mail, while not connected to the network, and wait for the CallPilot Logon window to appear. You do not need to enter your password.
4. Click **Cancel**.

You can then work offline, reviewing your messages, and recording and addressing new messages. You must use your computer speakers and microphone to play and record messages offline; you cannot use a telephone for offline access.

CallPilot stores your recorded messages in your Outbox, and sends them the next time you log in to the CallPilot server.

Message security in offline mode

If you share your computer with others, you can password-protect your messages in Outlook. Because Outlook automatically sends messages stored in the Outbox when you reconnect to the network, other users with access to your Outlook profile can send messages in offline mode that transmit without your knowledge. To protect your mailbox, assign a password to your Outlook .cst file. For details, refer to the Desktop Messaging online Help.

CallPilot Desktop Messaging User Guide for Microsoft Outlook

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